



USDA Weekly Retail Turkey Feature Activity

Fri. Nov 16, 2007

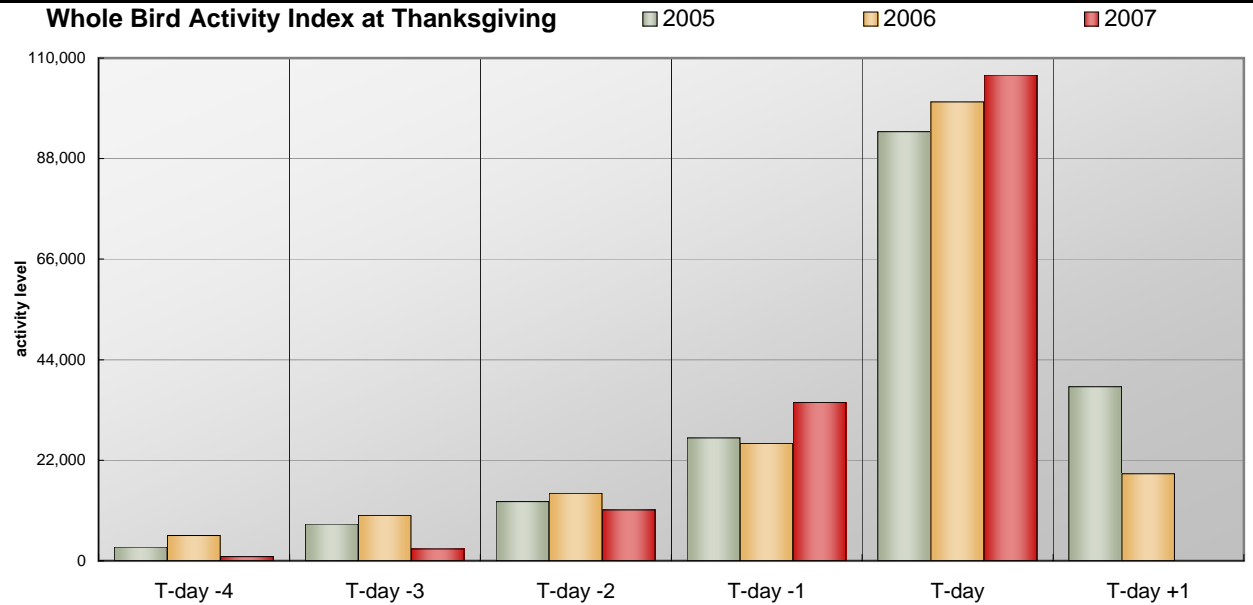
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/16 thru 11/22.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate 1/	99.3% of 17,000 outlets		75.4% of 17,000 outlets		99.6% of 17,000 outlets	
Special Rate 4/	10.5%		8.3%		13.3%	
Activity Index 2/	129,790		52,230		122,650	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	21,880	1.25	3,760	1.09	21,950	1.22
" - Toms	21,870	1.25	3,760	1.10	22,040	1.22
Frozen - Hens	31,170	0.85	13,520	0.77	27,920	0.78
" - Toms	31,350	0.84	13,650	0.76	28,530	0.76
PARTS:						
Breast:						
Bone-in, whole						
Fresh	7,400	2.15	1,920	2.28	5,840	2.05
Frozen	10,530	1.79	2,910	2.08	9,670	1.65
Hotel Style						
Fresh	20	1.99	20	1.99	10	1.79
Frozen						
Split, bone-in						
Fresh	20	2.69				
Rotisserie	1,320	7.47	840	7.13	3,460	7.88
Boneless, whole						
	60	3.99	20	3.99	240	3.27
Cutlets						
	40	3.99	430	4.39	260	4.20
Cutlets, thin sliced						
			200	4.21	70	3.99
Strips						
			140	4.99		
Tenders						
			490	4.20	100	3.91
Marinated Tenders						
	480	3.88	1,190	3.82	310	3.99
Drumsticks						
	430	1.22	30	1.09	100	1.13
Thighs						
	300	1.32			50	1.28
Wings						
	370	1.14	30	1.09	50	1.03
Necks						
	30	1.29			50	0.91
Smoked Drumsticks						
	140	1.61	380	1.91	390	1.86
Smoked Wings						
	140	1.61	330	1.92	40	1.39
Smoked Necks						
	130	1.59	310	1.89	40	1.39
GROUND TURKEY:						
	2,110	2.78	7,870	2.62	1,530	2.53
Patties						
	140	2.90	1,070	2.81	30	2.46
Sausage						
	640	2.64	1,990	2.50	760	2.30
85% lean						
	10	2.00	900	1.89	70	2.23
93% lean						
	1,080	2.44	2,780	2.39	290	2.08
Breast						
	240	4.66	1,130	3.82	380	3.38
Rolls (frsh/frz 1 lb.)						
			430	1.28		

Note: rolls not included in ground fresh ground turkey total and weighted average.

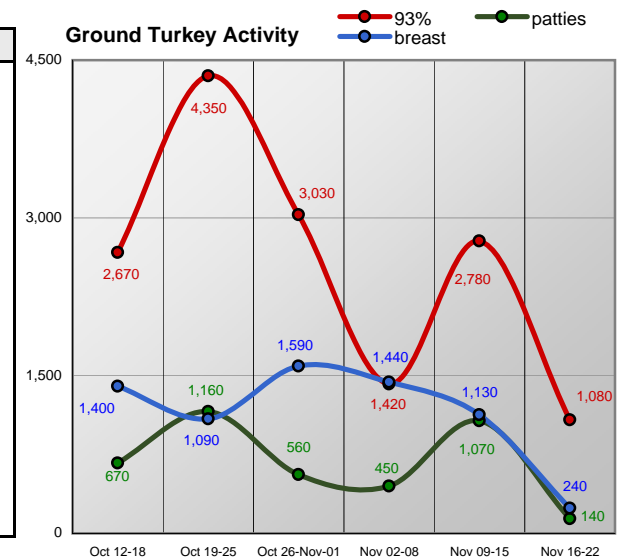
Whole Bird Activity Index at Thanksgiving



Turkey Featuring - 11/16 thru 11/22

Thanksgiving is less than a week away and whole turkeys and bone-in breasts take center stage. Retailers offer a wide range of promotions, including purchase based promotions and specialty turkeys ranging from organic to heritage breeds. Offers on fresh hens and toms are slightly less than last year but prices are slightly stronger. Frozen hens and toms are offered more freely this year and prices are much stronger. An increase in promotions on fresh and frozen bone-in breasts is accompanied by stronger prices compared to a year ago, but at more attractive prices than the previous week as consumer focus shifts to whole birds. Rotisserie breasts are offered as an alternative to fresh and frozen items. Dark parts are fully covered with a strong showing of fresh items. Ground turkey promotions are very light as expected for a holiday market.

Ground Turkey Activity



All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/: **FEATURE RATE**: the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. 2/: **ACTIVITY INDEX**: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/: **STORES/AVG**: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/: **SPECIAL RATE**: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.).



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	EASTERN U.S. (CT,DC,DE,FL,GA,MA,MD,ME,NC,NH,NJ, NY,PA,RI,SC,VA,VT,WV)			CENTRAL U.S. (AL,AR,IA,IL,IN,KS,KY,LA,MI,MN,MO,MS,ND, NE, OH, OK,SD,TN,TX,WI)			WESTERN U.S. (AZ,CA,CO,ID,MT,NM,NV,OR,UT,WA,WY)		
Feature Rate 1/ Special Rate 4/ Activity Index 2/	101.7% of 7,950 sampled outlets 8.2% of stores w/ no-price promotions Activity Index = 66,380			97.1% of 5,300 sampled outlets 16.5% of stores w/ no-price promotions Activity Index = 31,540			97.3% of 3,750 sampled outlets 6.6% of stores w/ no-price promotions Activity Index = 31,870		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
WHOLE BIRDS:									
Fresh - Hens	0.68 - 1.99	11,780	1.24	0.69 - 1.69	4,670	1.24	0.97 - 1.79	5,430	1.27
" - Toms	0.68 - 1.99	11,550	1.25	0.57 - 1.69	4,890	1.22	0.97 - 1.79	5,430	1.27
Frozen - Hens	0.25 - 1.69	15,100	0.92	0.29 - 1.49	7,590	0.79	0.31 - 1.79	8,480	0.78
" - Toms	0.25 - 1.69	15,160	0.92	0.28 - 1.49	7,490	0.81	0.23 - 1.79	8,700	0.73
PARTS:									
Breast:									
Bone-in, whole									
Fresh	1.59 - 2.99	4,150	2.07	1.59 - 2.89	1,750	2.19	1.99 - 2.99	1,500	2.31
Frozen	1.19 - 2.89	5,640	1.77	1.29 - 2.59	3,180	1.75	1.29 - 2.99	1,710	1.95
Hotel Style									
Fresh	1.99	20	1.99						
Frozen									
Split, bone-in									
Fresh	2.69	20	2.69						
Rotisserie	7.99 - 8.99	310	8.66	5.99 - 9.99	580	7.40	3.99 - 8.99	430	6.71
Boneless, whole	3.99	60	3.99						
Cutlets	3.99	40	3.99						
Cutlets, thin sliced									
Strips									
Tenders									
Marinated Tenders	3.73 - 4.26	480	3.88						
Drumsticks	0.99 - 1.68	160	1.28	0.99 - 1.29	270	1.18			
Thighs	1.68 - 1.89	70	1.73	1.19	230	1.19			
Wings	0.99	90	0.99	0.99 - 1.29	280	1.19			
Necks				1.29	30	1.29			
Smoked Drumsticks	1.59	130	1.59	1.89	10	1.89			
Smoked Wings	1.59	130	1.59	1.89	10	1.89			
Smoked Necks	1.59	130	1.59						
GROUND TURKEY:									
Patties	2.99	90	2.99	2.50 - 2.84	50	2.75			
Sausage	2.39 - 2.99	550	2.60	2.84 - 2.87	90	2.84			
85% lean				2.00	10	2.00			
93% lean	2.00 - 2.79	680	2.45	1.99 - 2.63	210	2.46	2.39	190	2.39
Breast (99-100% lean)	3.99	40	3.99	4.79	200	4.79			
Rolls (frsh/frz 1 lb.)									

A full breakdown of supermarket promotions featuring turkey and other poultry for Thanksgiving will be available on November 21, 2007 on our website at:

www.ams.usda.gov/poultry/mncs/Holiday%20Ads/HolidayAds.htm

This report provides a detailed breakdown of supermarket holiday promotions by region, state, and grocery chain including brand names, prices, and any special conditions for whole turkeys, turkey breasts, roaster chickens, capons, cornish hens, gizzards, livers, ducklings, geese, baking hens, shell eggs, egg nog, and liquid eggs.

This and all of our other holiday promotions reports are also available in spreadsheet format. Please contact us at the number/e-mail address below to receive the spreadsheet files.

USDA Agricultural Marketing Service, Poultry Market News & Analysis (202) 720-6911 - PYMN@usda.gov